

### 4.1.1 Option 1 - Review & Correction via Selection Set

Option 1 enables you to review all the data gathered in a survey period, or to create subsets of this data (for example, all questionnaire IDs from a given state, all IDs for a given SIC). Because this option provides access to the full range of detail review and correction screens, the screen that is displayed when you select Option 1 is called the Review and Correction Main Menu. The GOTO option on this screen allows you to update control information, view historical data and audit trails, change status of an ID and set up centralized mailing addresses.

To use the features of the Review & Correction Main Menu:

- Click on the REVIEW AND CORRECTION button from the StEPS Main Menu.
- Select Option 1 - Review & Correction via selection set. This displays the Review and Correction Main Menu (Figure 4.1).

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Review and Correction Main Menu - 2.00

Utility GoTo HELP Exit

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REVIEW AND CORRECTION MAIN MENU

Survey: ATS

Stat Periods: 1998A1 1997A1 1996A1

User Name: chew0001

Active Selection Set: SELSET- Created using "where" clause

If you wish to process a different selection set,  
please choose one of the following:

- ☐ Process All IDs
- ☐ Process an existing selection set
- ☐ Create simple selection set, using a "where" clause
- ☐ Create selection set, using Query module
- ☐ Access stored where clause for creating selection set

Figure 4.1 Review and Correction via selection set (Main Menu)

This screen allows you to:

- Choose 2 stat periods (in addition to the default) of data to review

- Create/specify a selection set
- Access the Review and Correction screens
- Select a different survey to review (by providing direct access to the Survey Selection screen)
- Unlock your ID and, if your permission = "P", to unlock all IDs

## Screen Features

The top of the screen displays:

### SURVEY

- To change the survey, choose the "Change surveys" option from the UTILITIES p-menu, or press 'Ctrl-D' to go to the Survey Selection screen.

(Press F3 on the Survey Selection screen to return to the Review and Correction Main Menu screen. Use EXIT to return to the StEPS Main Menu.)

### STAT PERIOD

- The default statistical period, as specified on the Survey Selection screen, is displayed in the first Stat Period field. To change the default stat period, access the Survey Selection screen by choosing "Change surveys" from the UTILITIES p-menu, or pressing 'Ctrl-D'.
- The second and third stat period fields, allow you to specify additional stat periods of data for review, are correctable and are described in Section 4.1.1.1, below.

**USER NAME** - Your "James Bond" ID displayed in the User Name field.

### ACTIVE SELECTION SET

- Displays the active selection set (SELSET) currently being processed. (Section 4.1.2 below explains how to create/specify a selection set.)
- You must specify a selection set before you can process survey data from this screen.
- Default is the last SELSET the user was processing

**SELECTION SET OPTIONS BOX** - Explained in Section 4.1.2

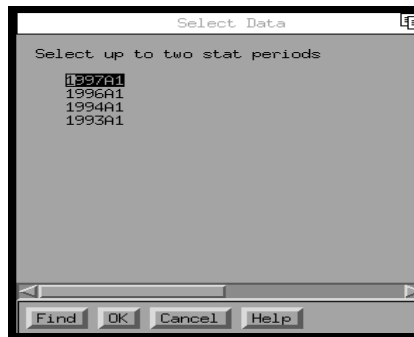


Figure 4.1.1.1 Stat Period Selection Screen

#### 4.1.1.1 SETTING ADDITIONAL STAT PERIODS

You may process just one stat period – the default stat period displayed in the first stat period field – or you may select up to 2 additional stat periods of data to review. Click on the arrow in the stat period field to bring up a pick list of available statistical periods. The screen shown as Figure 4.1.1.1 appears.

1. Available stat periods are listed in descending order.
2. To select 1 additional stat period, click on the stat period and then click “OK”.
3. To select 2 additional stat periods, hold down the CTRL key. Click the first stat period you want, then the second. Then click “OK.” (If you choose a second stat period without holding down the CTRL key, the second selection overwrites the first choice.)

#### 4.1.1.2 Choosing a Selection Set

A Selection Set allows you to process all cases in a survey or to create a subset (or “selection set”) of cases that meet specific criteria. For example, rather than processing all IDs (which could be a very large number of cases), you may want to review only those cases that have been checked-in, only those located in a specific state, or only those classified in a specific NAICS.

When you create/specify a selection set from the Review and Correction Main Menu screen, all other screens in the Review and Correction system will work from that selection set. This does not mean that you cannot access an ID outside of the selection set. It does mean, however, that the ID pick lists provided in the different review and correction screens will only display those IDs meeting the selection set criteria. If you use the function keys or Utilities options to access the “next” or “previous” ID, you will be accessing the next or previous ID in the selection set, not in the survey.

When you create or retrieve a selection set, a message in the upper left corner of the screen will display the number of cases in the set. You can use this count as a guide in case you want to narrow your search.

To specify a selection set, choose one of these options (explained in detail below):

1. Process all IDs
2. Process an existing selection set
3. Create simple selection set, using a WHERE clause
4. Create selection set, using the Query module
5. Access stored WHERE clause for creating selection set

#### **OPTION 1: PROCESS ALL IDS**

This option will create a selection set that includes all case ID's (up to 10,000) for the survey specified.

**NOTE:** This option pulls up only the first 10,000 cases. It is unlikely that you will want to create a selection set of "ALL IDS" if the total number of cases in the survey exceeds 10,000. To include all cases if there are more than 10,000, use option 3 - "Create simple selection set using a WHERE clause" (For example, if you create a WHERE clause to retrieve all IDs that are equal to or less than the maximum value possible for the 11-character ID (i.e., "ID LE 9999999999") all cases will be retrieved.

This option will:

- Automatically assign a filename of SELSET. StEPS will retain up to 5 selection sets with names of SELSET1 up to SELSET5.
- Automatically assign a description of, "All (up to 10,000) IDs in selection set" that will display on the screen..

#### **OPTION 2: PROCESS AN EXISTING SELECTION SET**

Option 2 displays a pick list of previously created selection sets (Figure 4.1.1.2a):

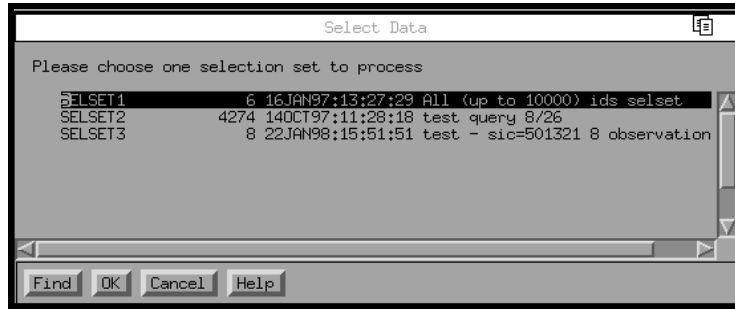


Figure 4.1.1.2a Process an Existing Selection Set Screen

Column 1: Name of selection set (automatically assigned by program at time of creation)  
 Column 2: Number of observations in the selection set  
 Column 3: Date/time selection set was created  
 Column 4: Description of selection set (entered by the person creating the set when selection set was first defined)

- Choose a selection set by clicking on it with the mouse.
- The name (SELSET.....SELSET5) and the description of the selection set chosen, will appear in the “Active selection set” field on the Review and Correction Main Menu.
- The number of observations in the selection set will be displayed in the upper left corner of the screen.

**OPTION 3: CREATE A SIMPLE SELECTION SET USING A “WHERE clause”**

- You can create a selection set using a simple WHERE clause (i.e., review all cases “where SIC = 3721”). This option will display the following StEPS standard WHERE clause screen (Figure 4.1.1.2b).

- You build your WHERE clause by selecting a variable from the “Available

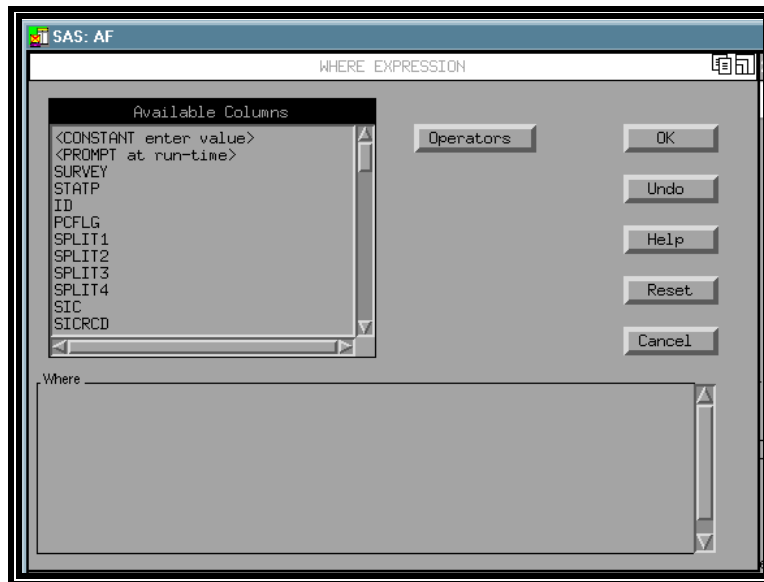


Figure 4.1.1.2b Standard WHERE Clause Screen

Columns” box, choosing an operator, and define a constant. [The variables listed in “Available Columns” are from the Master Control File (CT) and the Statistical Period Control (C1) file.]

For example, to create a selection set of IDs where “SIC = 50321” (‘SIC’ is the variable, ‘EQ’ is the operator, and ‘50321’ is the constant), you would do the following:

1. Select “SIC” from the “Available Columns” box
2. Click on “Operators” to bring up a pick list of available operators:

EQ	Equal to
NE	Not equal to
GT	Greater than
GE	Greater than or equal to
LT	Less than
LE	Less than or equal to

3. Click on “EQ” (equal to)
4. Click on “<CONSTANT enter value>” which is the first listing in the “Available Columns” box. Another box will display to allow you to enter a value. Enter the constant “50321” and press <ENTER> OR select “LOOKUP” to display a pick list of valid SIC’s, from which to choose.

**NOTE:** Click on the HELP button to access help information for this screen.

Date formats (i.e., check-in, extension) are displayed in a SAS format. To enter a date, select the “CONSTANT” option in the “Available Columns” box. A data

entry box will appear where you can enter a date using the format YYMMDD, where YY is the last 2 digits of the year, MM is the month (01 through 12) and DD is the day (e.g., May 31, 2003 is 030531).

- As you build your WHERE clause, it will be displayed in the WHERE box, at the bottom of the screen. Choose a button from the right side of the screen to do the following:

OK	Submit the WHERE clause and create the selection set
UNDO	Remove the last variable, operator, or constant from the WHERE clause
HELP	Access HELP information on using this screen
RESET	Clear your current WHERE clause
CANCEL	Do not submit the WHERE clause; return to the Review and Correction Main Menu

### Running the WHERE clause to build the selection set

After you create your WHERE clause, you must RUN it to actually build the list of cases to be included in your selection set.

1. Click on the “down” arrow, to the right of the text box that displays the WHERE clause.
2. Select RUN.
3. Wait while the system searches the data files and builds the list of cases. When the run is complete, the total number of cases in the selection set will appear in the upper right hand corner.

### Saving your selection set

- When you create a selection set, it is saved as a temporary data set, unless you choose to make it permanent. Temporary data sets are active only for the current session and are deleted when you create or access a different selection set to process or when you leave the Review and Correction module.
- StEPS will prompt you to save your newly created selection set to a permanent file.
  - Click “Yes” to save the selection set to a permanent file
  - Click “No” if you do not want to save the selection set to a permanent file.
- If you click “Yes,” the screen shown as Figure 4.1.2c will appear.

- StEPS will automatically assign a filename of SELSET1.....SELSET5.
- You will be prompted to enter a description. Enter a description (40 characters or less). This description will appear when you select Option 2 (screen 4.1.2a).

You may store up to 5 selection sets in StEPS. If you already have 5 selection sets and wish to save another, StEPS will prompt you to overwrite an existing set.

If you choose NOT to create a permanent file, the temporary data set will automatically be assigned a description, as well as a filename. The filename will be SELSET and the description will be: “Created using ‘where’ clause”.

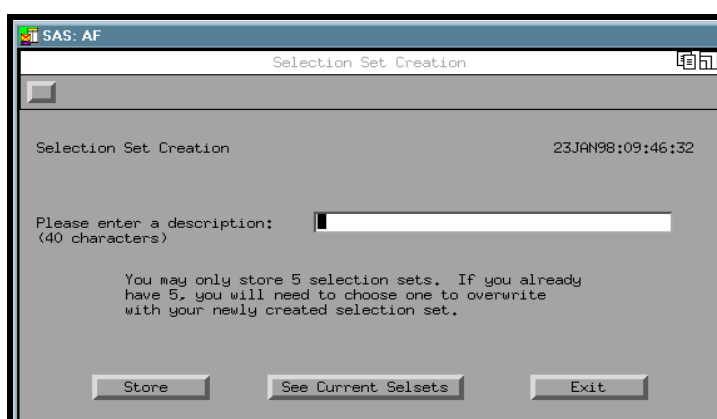


Figure 4.1.2c Selection Set Description Screen

### Saving your WHERE clause

There are two ways to save your WHERE clause:

1. When you create your selection set, StEPS will automatically ask if you want to save your WHERE clause. Click “Yes.”
2. Click the down arrow to the right of the text box that displays the WHERE clause, then click on the “Save/new” option to save your WHERE clause.

WHERE clauses are automatically saved in the SASUSER.WHERE catalog. This means that you may access any of your saved WHERE clauses regardless of which survey you are currently processing. StEPS will automatically assign the filename

“SASUSER.WHERE.filename.SOURCE”

where “filename” is the first six characters of the first control variable in the WHERE clause, followed by a 2-digit sequence number. For example:



WHERE clause: SICRCD GT '3140'  
Filename: SICRCD01

The first 40 characters of the WHERE clause will be used as the description for the catalog entry. This is the description you will see whenever you choose to use a saved WHERE clause and the list of saved WHERE clauses and associated descriptions is displayed (see Option 5- Figure 4.1.2d).

The table below shows the options available from the down arrow by the WHERE clause box. In addition to the RUN and SAVE/NEW options discussed above, this arrow displays functions that allow you to check the syntax of any entry you have typed into the WHERE box, to replace a WHERE clause with a new version, to undo changes or delete the WHERE clause, and to exit the WHERE clause box.:

OPTION	DESCRIPTION
Run	Run the query currently displayed in the text box to create a selection set
Check syntax	Check the SAS syntax of the WHERE clause currently displayed in the text box
Save / new	Save the query displayed in the text box as a new file
Save / replace	Save the query, currently displayed in the text box, by overwriting the original query.
Undo	Undo any changes made (to the query) in the text box.
Delete	Delete the query currently displayed in the text box.
Exit	Exit the "WHERE clause options" menu.

#### OPTION 4: CREATE SELECTION SET USING THE QUERY MODULE

The QUERY module uses the SAS ASSIST function to perform more complex queries and saves the result as a SELSET. This option was made available early on in StEPS, before the Review and Correction WHERE clause functions were fully developed. Using this module is not recommended. It is better to use the other Review and Correction browse options (options 2, 3, or 4) or, if the review requirements are complex, go into the TOOLS module.

#### OPTION 5: ACCESS STORED “WHERE clause” FOR CREATING SELECTION SET

To create a selection set using a saved WHERE clause (as described above under option 3), click on option 5. A pick list of all existing WHERE clauses will display, giving the name of the WHERE clause, its description, and the date that it was created or last updated. (The name is the first six characters of the first control variable, followed by a 2-digit sequence number. The description is the first 40 characters of the WHERE clause. As described in option 3, the name and description were automatically created when the WHERE clause was saved.)

Highlight a WHERE clause to select it. The WHERE clause will display in the text box at the bottom of the Review and Correction Main Menu screen (Figure 4.1.2d).

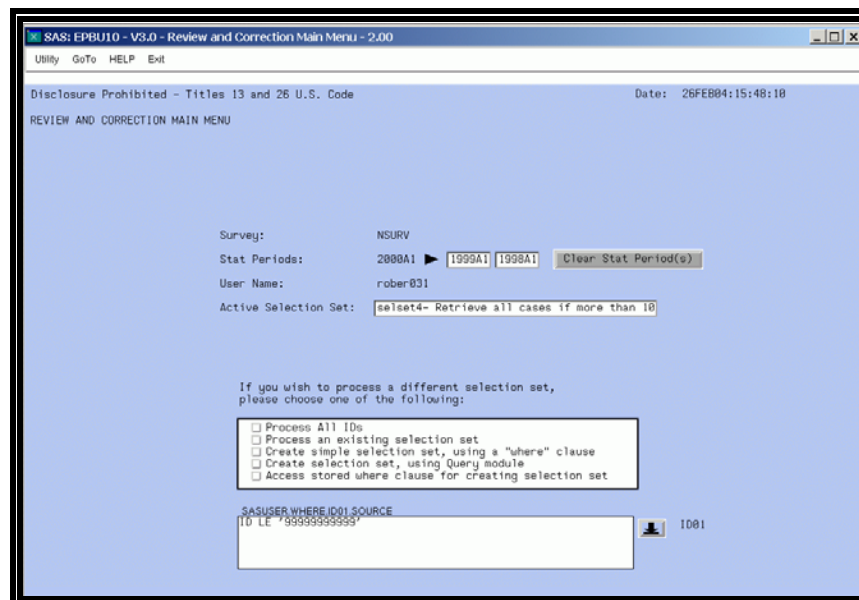


Figure 4.1.1.2d Screen After Selecting Saved WHERE Clause

You may edit the WHERE clause within the text box. (Note: When editing a WHERE clause, you must use single quotes. If you use double quotes, an error message will display.)

After you select or select and edit a WHERE clause, you must use the RUN option, available from the down arrow by the WHERE clause box to create the selection set.

Once you select or create a selection set to process, you can access any one of the Review and Correction screens using the GOTO p-menu. See Section 4.4 below for a complete list of available Review and Correction screens and corresponding descriptions.

#### **4.1.1.3 UNLOCK IDS**

StEPS does not allow two users to access the same ID at the same time. If you try to access an ID that is already held by another user, you will see a message informing you that the ID is locked and that you should try to access it again later. Sometimes an ID can be locked by the same user who tries to access it later. This can happen if the user exits the system improperly or if the system has crashed. If an ID is locked under your own user name, you can unlock it by selecting the “Unlock my IDs” option from the UTILITIES p-menu.

You cannot unlock an ID held by another user, unless you have management privileges (MGMT = ‘P’). If it is necessary to unlock all IDs in the survey, you can select the “Unlock all survey IDs” option from the UTILITIES p-menu, provided you have the proper privileges.

#### **4.1.4 SCREENS AVAILABLE VIA REVIEW AND CORRECTION MAIN**

##### **MENU**

<b>Screen Name</b>	<b>Function</b>
<b>Review and Correction Main Menu</b>	Create/specify a selection set; select up to 2 additional stat periods of data for review; access the Review and Correction screens; unlock ID's.
<b>AVAILABLE FROM GOTO P-MENU OPTION OF MAIN MENU</b>	
<b>FROM CONTROL DATA OPTION</b>	
<b>Survey Master Control File</b>	Select ID and view survey master control information. (View only, cannot edit.)
<b>Control Information</b>	Edit and view survey control information (i.e., IDs, name, address, phone, contact, SIC, weight) for a specified stat period..
<b>Status Changes</b>	Add, delete, ghost, merge, reserve, make ownership change, and restore case IDs to the survey panel.

<b>Screen Name</b>	<b>Function</b>
<b>Mail Group</b>	Set up a centralized mailing address for a group of IDs.
<b>Alternate Reporting Units</b>	Specify an alternate reporting unit for an ID
<b>Audit Trail (2 display options - Control Audit by ID Control Audit by Date)</b>	View changes that have been made to an ID's control record. (The audit trail lists the old and new value of the updated item, identifies who made the last change, and indicates the date/time that the change took place.)
<b>FROM ITEM DATA OPTION</b>	
<b>ID by Item</b>	View and correct item data for a specified ID. This screen has options that will display data for the prior and the prior/prior stat periods, if such data exists.
<b>ID by Item CP (Current/Prior)</b>	For a given ID, displays a matrix comparing item data collected in the current statistical period with data collected for those same items in up to 2 previous statistical periods. Can specify an item name for current period and define up to 2 different item names to compare in the matrix. Can select which 2 previous stat periods to view and can correct data.
<b>ID Matrix</b>	View item data for an ID in a matrix (columns/rows) format, for a specified stat period. View different versions of the data: reported, edited, adjusted, weighted-adjusted and edit item data for the current stat period. For a single ID: run the edit, derive data, weight data, and run simple imputation. Access the Notes screen for an ID.
<b>Item by ID</b>	View individual ID data for a specified item
<b>Historical Data - 2 options Single Item One or More Items</b>	View historical item data for an item or ID for a specified number of statistical periods. Specify items to display, view different versions of the item data: reported, edited, adjusted, weighted-adjusted, and view current-to-prior period ratios for the items specified. Can edit item data and access the Notes screen for an ID
<b>Audit Trail (2 display options - Item Audit by ID Item Audit by Date)</b>	View changes that have been made to an ID's item data. (The audit trail lists the old and new value of the updated item, identifies who made the last change, and indicates the date/time that the change took place.)
<b>Basic Data Entry</b>	Enter reported data for a specified ID. (Typically for late receipts, not for updating.)
<b>Roster Matrix</b>	View and correct roster item data for a specified ID. (Data is displayed in a matrix [columns/rows] format). View different versions of the data: reported, edited, adjusted, weighted-adjusted. (See section 4.16 for more detail on roster data.)

Screen Name	Function
<b>Audit Trail (2 display options - Roster Audit by ID Roster Audit by Date)</b>	If an ID has a roster record, view changes that have been made. (The audit trail lists the old and new values, identifies who made the last change, and indicates the date/time that the change took place.)
<b>Respondent Text</b>	View and correct respondent text for a specified ID.
<b>AVAILABLE FROM ID-BASED REVIEW AND CORRECTION SCREENS (e.g., Control Information, ID by Item and ID by Item-CP, Item by ID, and ID Matrix)</b>	
<b>Add Item</b>	Add an item record to the ID item file. Only accessible as a p-menu option from the ID by Item , ID by Item CP and ID Matrix screens. Select Edit/Add Item (or use CTRL+A).
<b>Notes</b>	Add, modify, and delete analyst notes, interviewer notes or respondent notes for an ID. Available from a p-menu option (or by using CTRL+N) from the following screens: Control Information, ID by Item, ID by Item CP, ID Matrix, Historical Data (Control and Item), Audit Trail by ID (Control and Item)
<b>Collection History</b>	View dates for survey collection activities such as, mailout, follow-up. Available from the Control Data/Collection History p-menu option (or by using CTRL+L) from the following screens: Control Information, ID by Item, ID by Item CP, ID Matrix, Historical Data (Control and Item), Audit Trail by ID (Control and Item)

The following function keys may be used instead of p-menu options to access the more commonly used Review and Correction screens:

Screen	Function Key
Survey Selection	CTRL - D (only available in Option 1 - Review and Correction via selection set)
ID by Item	CTRL - I
Basic Data Entry	CTRL - B
Add Item	CTRL - A (available from ID by Item Screen)
ID Matrix	CTRL - M
Item by ID	CTRL - T
Historical Data	CTRL - H
Roster Matrix	CTRL - O
Control Information	CTRL - C
Status Changes	CTRL - S
Respondent Text	CTRL - R
Notes	CTRL - N
Mail Group	CTRL - G
Collection History	CTRL - L

The selected stat period(s) will be displayed on the Review and Correction Main Menu in descending order, regardless of the order in which they were chosen. They will become the default prior stat periods for the Review and Correction module.

## P-Menu for Review and Correction via selection set screen

P-Menu	Options	Function
UTILITIES	Change Survey (CTRL - D) Unlock my IDs Unlock all survey IDs	Access Survey Selection screen Unlock your IDs only Unlock all IDs in survey (special privileges required)
GOTO	Control Data ➤ Survey Master Control File Control Information Status Changes Mail Group Alternate Reporting Units Audit Trail ➤ Control Audit by ID Control Audit by Date  Item Data ➤ ID by Item ID by Item CP ID Matrix Item by ID Historical Data ➤ Single Item One or More Items Audit Trail ➤ Item Audit by ID Item Audit by Date Data Entry ➤ Basic Data Entry  Roster Data ➤ Roster Item Matrix Audit Trail ➤ Roster Audit by ID Roster Audit by Date  Respondent Text	Access the Survey Master Control File screen Access Control Information screen Access Status Changes screen Access the Mail Group screen Access Alternate Reporting Units screen Access Control Audit by ID screen Access Control Audit by Date screen  Access ID by Item screen Access ID by Item Current/Previous screen Access ID Matrix screen Access Item by ID screen Access Historical Data screen for a single item Access Historical Data screen for multiple items Access Item Audit by ID screen Access Item Audit by Date screen Access Basic Data Entry screen  Access Roster Matrix screen Access Roster Audit by ID screen Access Roster Audit by Date screen  Access Respondent Text screen
HELP	Data Review and Correction Menu Help (F1)  Function Key Help WhoamI (F7)	Display HELP information on using the Review and Correction Main Menu screen Display list of function keys and descriptions Display user default and systems information
EXIT	StEPS Main Menu (Home) Exit (F3)	Return to StEPS Main Menu Exit to previous screen